

Massachusetts Charter Schools & Their Feeder Districts:

A Demographic Analysis

Fall 2004

Introduction

Charter schools continue to be a highly controversial topic on the education landscape. Their funding, effectiveness, and possible expansion are subjects of ongoing debate and policymaking. Charters represent an alternative approach to the traditional public system, and both implicit and explicit in their missions is the expectation that they would provide an alternative for *all* types of students who participate in public education.¹ The choice and charter programs written into both the federal No Child Left Behind Act of 2001 and the Massachusetts Education Reform Act of 1993, for example, hinge on this premise of inclusiveness.² Hence, comparisons of charter school demographics and mainstream public school demographics are frequently invoked in deliberations over the future of charter schools. This report is intended to infuse these deliberations with a comprehensive analysis of the populations Massachusetts charters serve relative to their feeder districts and, in so doing, inform future policy decisions.

There is substantial confusion about the demographic profile of students who attend charters, and misinformation flows both from sources in favor of and opposed to charters. Charter advocates suggest that charters serve a more diverse subset of students than traditional school districts—a factor that, if true, would indicate that charters undertake a greater educational challenge. Opponents claim the converse—that charters cream the easiest-to educate students out of the traditional public system, leaving behind the most challenging students, particularly special education students and English language learners.³ Both claims are generalizations built on half-truths that obscure important nuances. Our study found that:

- On the whole, charters over-serve students in some racial/ ethnic categories and under-serve students in others;
- Individual charters vary in the degree to which they serve students requiring special services; and
- The profiles of urban charters differ from suburban and rural charters.

¹ Charter schools, by law, are not required to serve students with severe special needs. This legislation accounts for some of the disparity between real and expected values in this category. This point will be explored further in the later sections of the report.

² Laws governing charter schools in Massachusetts expressly prohibit discrimination in admission and prohibit entrance exams as an admissions criterion.

³ Solomon, L. and Goldschmidt, P. (2004). *Comparison of traditional public schools and charter schools on retention, school switching and achievement growth*. Arizona: The Goldwater Institute; Berman, S. (September 13, 2004). *Time to reassess costly charter schools*. The Boston Globe.

This report takes a first step toward determining whether charter schools face an educational challenge greater than, lesser than, or equal to those of school districts by contributing an analysis of who attends charters, across all demographic categories. In so doing, it lays the foundation for more accurate research on the achievement of charters relative to schools in the traditional public system.

The purpose of the report is to shed light on questions regarding the populations that charter schools serve. The first section of the report presents data on the student demographics of charter schools and compares them, proportionally, to the districts from which they derive their student populations. The data are analyzed in seven population categories:

- African American students
- Hispanic students
- White students
- Asian students
- English language learners (ELL)
- Special education students
- Low-income students

The second section of the report examines some of the potential explanations for population variation between charters and their feeder districts by considering the policies and practices that impact students' decisions about where to attend school. We surveyed and interviewed charter leaders, school district officials and state officials to better understand the incentives and disincentives that exist in the current system. This section concludes with a series of policy implications for state, district and charter leaders to consider.

Methodology

Phase I of this project began with a quantitative analysis of demographic data obtained from the state Department of Education on all Commonwealth and Horace Mann Charter Schools. The objective of the analysis was to compare the actual populations that charter schools serve to the populations they would be expected to serve based on the demographics of the districts from which their students matriculated.⁴ A charter school that is receiving the same allocation per pupil as a district would be expected to serve roughly proportionate numbers of low-income students, English language learners, special education students. Likewise, the district and charter would be expected to share a similar racial and ethnic composition.

It is important to note that charters serve not only students from the districts in which they are housed; they are also open to students from surrounding districts. To accommodate for this fact, the expected rates reported here are derived through a weighted formula that includes all sending districts proportionally. That is, sending districts' data are weighted by the percentage of the sending districts' representation in the charter school. See inset for formula detail.

⁴ When we use the term "expected" with respect to demographic categories, we are referring to the predicted value that was obtained by calculating the populations of feeder district. This is not intended to suggest that charter populations *should* mirror the populations of feeder districts. This research treats the subject of whether it is desirable for charters to mirror the populations of their sending districts as an open question. This point will be explored further in the later sections of the report.

Calculations of “Expected” Charter Populations

Charter School “A” enrolls a total population of 100 students who are drawn from three Districts: X, Y, and Z.					
District X		District Y		District Z	Charter School “A”
sends 50 students (50%)	+	sends 30 students (30%)	+	sends 20 students (20%)	= receives 100 students (100%)

Sending Districts X, Y, and Z have total student populations with the following demographics:		
District X	District Y	District Z
80% White 20% Hispanic	40% White 60% Hispanic	90% White 10% Hispanic

Charter School “A” demographics are expected to proportionately reflect demographics of sending Districts: X, Y, and Z.					
	Charter School “A” Student Population		Sending District Demographics		Expected Demographics of Students Sent to Charter School “A”
District X	50%	x	80% White	=	40% White
		x	20% Hispanic	=	10% Hispanic
District Y	30%	x	40% White	=	12% White
		x	60% Hispanic	=	18% Hispanic
District Z	20%	x	90% White	=	18% White
		x	10% Hispanic	=	2% Hispanic

Expected Charter School “A” Demographics		
	Hispanic Students	White Students
Sent From District X	10%	40%
Sent From District Y	18%	12%
Sent From District Z	2%	18%
Total Received by Charter School “A”	30%	70%

For Phase II of the project, once the demographic data were analyzed, we asked leaders of both charter schools and public school districts to help us explain the demographic data. We administered a three-question survey via e-mail and telephone to six charter school principals and public school leaders. After being presented with summary data (described in detail below), leaders were asked:

- How they would explain the variation between the demographics of charters and the demographics of sending districts;
- What policies and practices might account for these variations; and
- What, if anything, they would like to do to change this current situation.

To supplement this information, we spoke with several state leaders involved with charter policy.

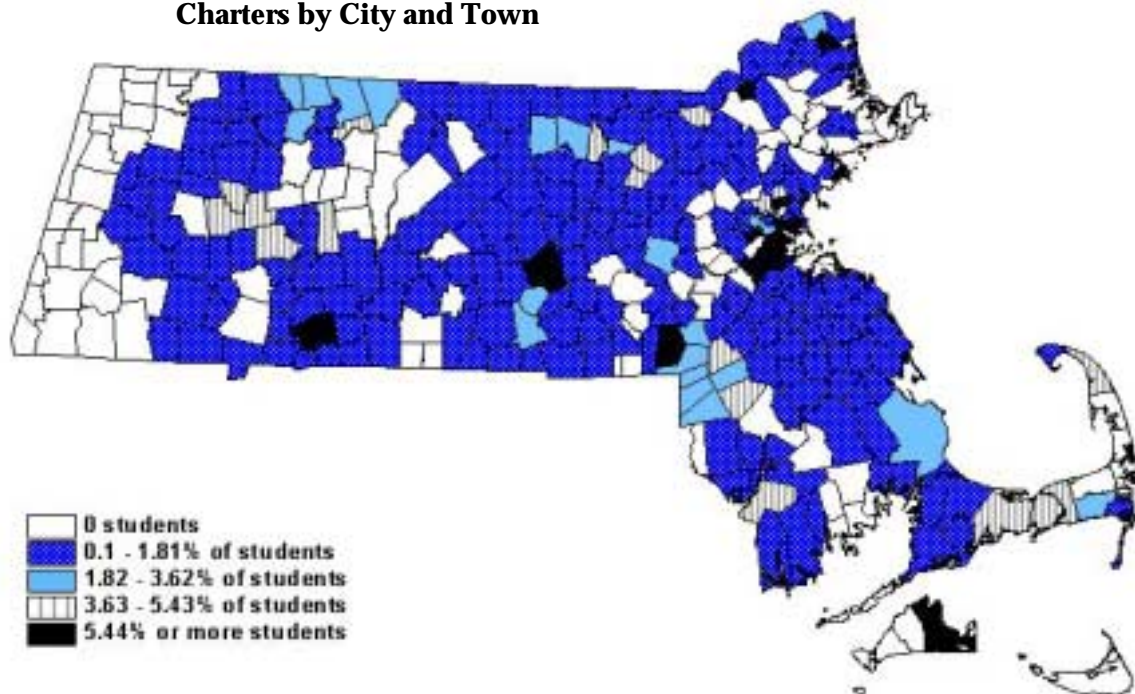
Enrollment Overview

Charter schools in Massachusetts enrolled just under 20,000 students in fifty schools during the 2003-04 school year.⁵ As a testament to public interest in the innovation, the number of students on wait lists is almost as high as high as charter enrollment; nearly 14,000 students were on charter wait lists last year. All but nine charters had a wait list, and some charters had wait lists that double or even triple their enrollment capacity.

While public demand for charters currently exceeds supply, it is important to keep the scope of the current reach of charters in perspective. Charters serve only a fraction of public students in Massachusetts—just under 2.0%. And charter schools are unevenly distributed across the state. They are located in twenty-five of the state's 380 school districts. Seventeen of fifty charter schools —more than one-third of the total number— are located in Boston. Other urban areas such as Springfield, Worcester, Lawrence and Lowell each host multiple charter schools.

Because parents tend to enroll their students in schools that are proximate to their homes, charter attendance in urban areas tends to be higher than in other areas of the state. For example, Boston's charter enrollment is 7.4% of the total public school going population, almost quadruple the state's average charter enrollment. Enrollment in Lawrence (6.4%), Springfield (6.2%), and Malden (7.7%) is also more than three times the state average. These data track with national research, which suggests that charters tend to be most abundant in urban areas where dissatisfaction with the traditional public system tends to be higher.⁶

**Percent Students Enrolled in
Charters by City and Town**



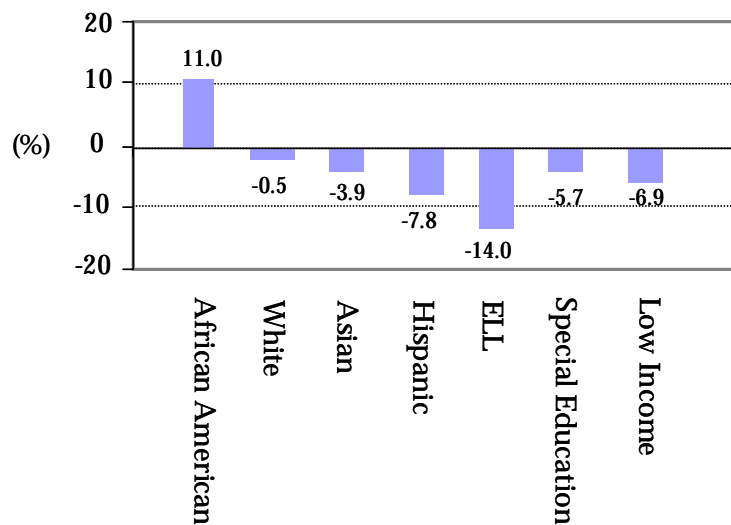
⁵ Independent state auditor's review of certain aspects of charter school financial results and financial reporting: Fiscal years 2002 and 2003.

⁶ Hoxby, C.M. (2004). A straightforward comparison of charter schools and regular public schools in the United States. Cambridge, MA: National Bureau of Economic Research.

Demographic Overview

The demographics of charter schools differ in almost all cases from the demographics of their sending districts. We begin by presenting the mean differences for comparisons of all charter schools to their feeder districts in terms of seven demographic categories. These overall numbers reveal significant trends in population patterns. Overall, charters tend to serve more African American students than they would be expected to serve based on the populations of the feeder districts. On the other hand, charters serve fewer Hispanic students, English language learners, special education students and low-income students than their sending districts. See inset for detail.

Overall Difference Between Charter & District Enrollments



While the above comparisons provide a useful statewide overview, further analysis of the data makes clear that the variance between charters and their feeder districts is greater in urban areas than suburban areas. For example, charters in urban areas tend to serve far more African American students than their sending districts and far fewer special education students than their sending districts, while the demographic differences between non-urban districts and the charters within them are less striking. In particular, the seventeen charters located in Boston skew the overall numbers toward reflecting Boston's individual case. For that reason, the following sections present analysis that distinguishes among three geographic categories:

- Boston;
- All other urban areas; and
- Suburban and rural areas.

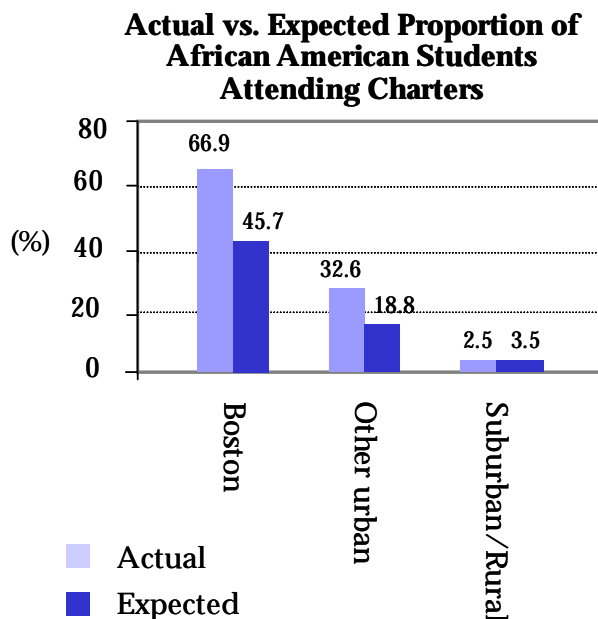
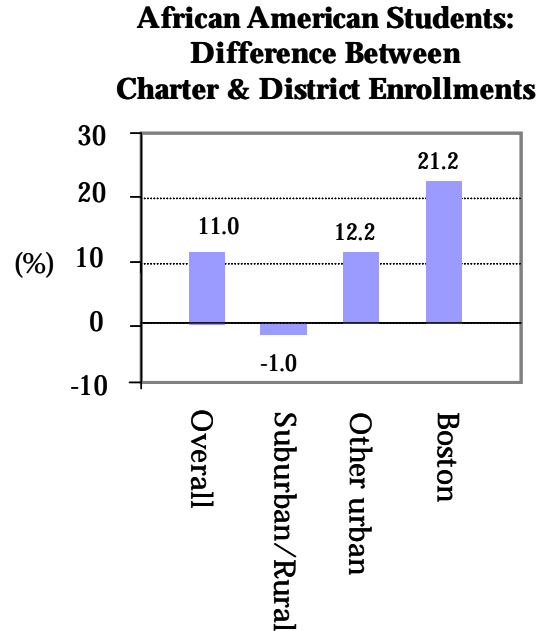
Breakdown of Charters by Geographic Category

Boston	Other Urban⁷	Suburban and Rural
Academy of the Pacific Rim Charter	Abby Kelly Foster Charter, Worcester	Academy of Strategic Learning Charter, Amesbury
Boston Evening Academy Charter	Atlantis Charter, Fall River	Barnstable Horace Mann Charter
Boston Renaissance Charter	Benjamin Banneker Charter, Cambridge	Benjamin Franklin Classical Charter, Franklin
City on a Hill Charter	Champion Charter, Brockton	Cape Cod Lighthouse Charter, Orleans
Codman Academy Charter	Community Day Charter, Lawrence	Four Rivers Charter, Greenfield
Conservatory Lab Charter	Lawrence Family Development Charter	Framingham Community Charter
Edward Brooke Charter	Lowell Community Charter	Francis W. Parker Charter, Devens
Excel Academy Charter	Lowell Middlesex Academy Charter	Hilltown Cooperative Charter, Haydenville
Fredrick Douglas Charter	Mystic Valley Regional Charter, Malden	Marblehead Community Charter
Health Careers Academy Charter	New Bedford Global Learning Charter	Martha's Vineyard Charter, West Tisbury
Media and Technology Charter	New Leadership Charter, Springfield	Murdoch Middle Charter, Chelmsford
Neighborhood House Charter	North Central Charter, Fitchburg	Pioneer Valley Performing Arts Charter, Hadley
Roxbury Charter High School	Robert Hughes Charter, Springfield	Rising Tide Charter, Plymouth
Roxbury Preparatory Charter	Sabis International Charter, Springfield	River Valley Charter, Newburyport
Smith Leadership Academy Charter	Seven Hills Charter, Worcester	Sabis Foxborough Regional Charter
South Boston Harbor Academy Charter		South Shore Charter, Hull
Uphams Corner Charter		Sturgis Charter, Hyannis

⁷ Prospect Hill Charter School in Somerville has been excluded from analysis because of missing data.

African American Students

In urban areas across the state, charter schools serve proportionally more African American students than their sending districts. In suburban/ rural areas, charters serve slightly fewer than would be expected. The degree of difference between charters and districts varies immensely from Boston, to other urban areas, to suburban and rural areas. The gap between charter schools and feeder districts is widest in Boston, where charters serve 21.2% more African American students than they would be expected to serve. That gap closes by more than half in other urban districts, where the difference is 12.2%. Finally, in suburban and rural areas, charters serve proportionally fewer African American students than they would be expected to serve by a small margin, 1% fewer than feeder districts.⁸

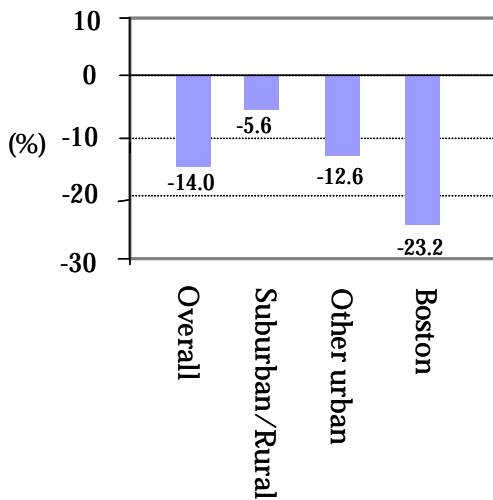


The figure to the left illustrates the difference between actual and expected values of African American students attending charters across the three geographic categories. It clarifies that charters located in urban areas, particularly in Boston, would be expected to serve a higher proportion of African American students than suburban and rural areas, because African American students are better represented in the overall population in urban areas. Charters in urban areas exceed, by a considerable margin, their responsibility to serve this

demographic. By contrast, charters in suburban and rural areas would be expected to serve fewer African American students than the urban areas, but they serve even fewer than would be expected based on suburban and rural district proportions.

⁸ Many suburban and rural charters—seven schools total— do not enroll any African American students.

**ELL Students:
Difference Between
Charter & District Enrollments**



English Language Learners

Charters across the state serve proportionally fewer ELL students than their sending districts. As with African American student enrollment patterns, the most pronounced differences between English language learner populations in charters and their feeder districts are found in the Boston area, and the least pronounced differences are found in suburban and rural areas. However, in the case of English language learners, districts tend to serve *higher* proportions of English language learners; charters serve fewer. Suburban/ rural charters serve 5.6% fewer ELL students than would be predicted by the populations of their feeder districts. The gap in Boston between charters and districts is more than quadruple that size,

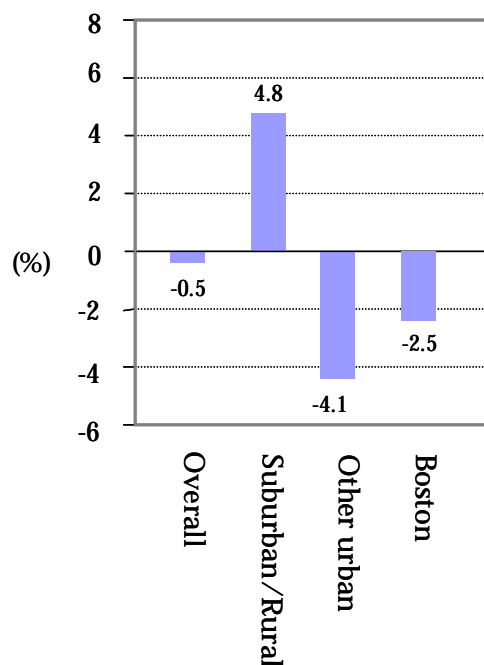
with charters serving 23.2% fewer ELL students than predicted by feeder districts. In other urban areas, charters served 12.6% fewer ELL students than predicted.

White Students

Suburban and rural charters serve proportionally more white students than their sending districts, while urban districts serve slightly fewer white students than their sending districts.

Almost all suburban and rural charters serve *more* white students than they would be expected to serve based on the populations of their feeder districts (4.8%). South Shore Charter School in Hull, which enrolls 3.4% *fewer* whites than would be expected, is the exception with the largest gap in favor of minority enrollment. In contrast to suburban and rural areas, Boston charters serve 2.5% *fewer* white students than would be predicted. The other urban areas serve an even smaller proportion of white students (4.1% fewer) than Boston charters when compared to sending districts.

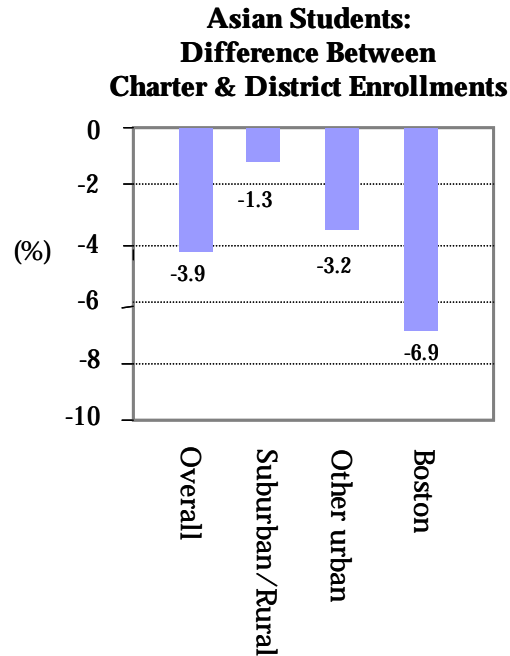
**White Students:
Difference Between
Charter & District Enrollments**



Asian Students

All geographic groups of charter schools enroll fewer Asian students than the populations of their feeder districts would predict.

The gap between charters and district predicted values is largest in Boston, with charters serving 6.9% fewer Asian students than would be expected. That gap is cut more than in half for other urban areas, with charters serving 3.2% fewer Asian students. In suburban/ rural areas, the gap is less than a quarter of what it is in Boston at 1.3%.

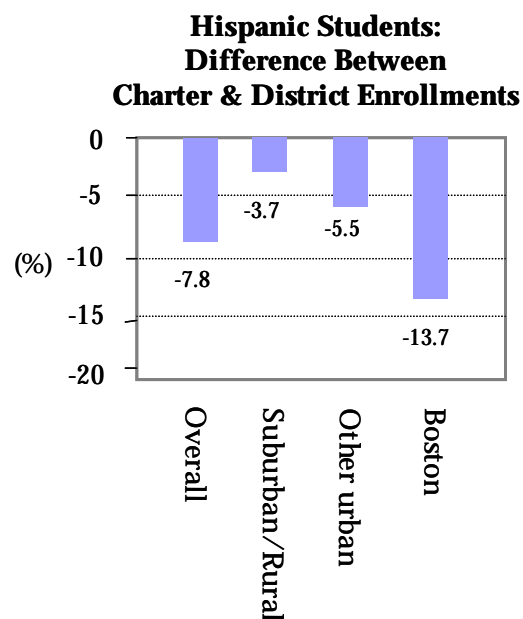


Hispanic Students

All but five charter schools in the state serve fewer Hispanic students than would be predicted by the populations of their feeder districts.

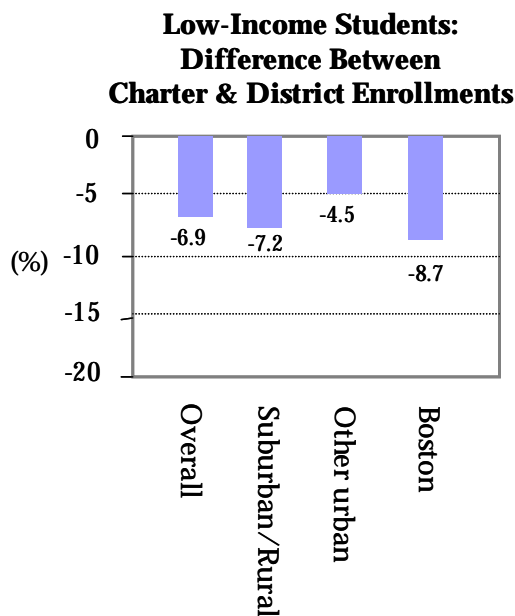
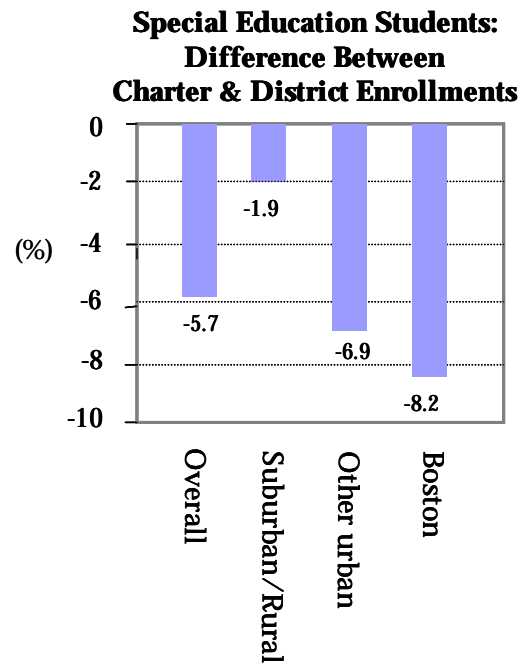
Charters in Boston serve 13.7% fewer Hispanic students than they would be expected to serve based on the populations of their feeder districts. The difference between actual and expected charter enrollment in urban areas outside Boston is similar to the difference in suburban/ rural areas. At 5.5% fewer and 3.7% fewer, respectively, they come substantially closer than Boston charter schools do to serving a Hispanic population that mirrors their feeder districts.

Our three geographic categories, however, conceal some important differences within those groupings. For example, Lawrence and Lowell are the only places in the state in which charters consistently over-serve Hispanic students, even when compared to the large Hispanic populations in feeder districts in those areas. Hispanic student populations in charters are lower than district demographics would predict them to be in all but six charter schools in the state. That is, almost 90% of charter schools under-serve Hispanic students. The exceptions are: Excel Academy in Boston, Lawrence Family Development Charter, Lowell Community Charter, Lowell Middlesex Academy Charter, Champion Charter in Brockton, and Roxbury Preparatory Charter in Boston.



Special Education Students

Across the state, charter schools serve proportionally fewer special education students than their sending districts. With respect to special education students, charters in Boston and the other urban centers of the state have similar gaps between actual and expected student populations. Boston serves 8.2% fewer special education students than the district rate. Other urban districts enroll 6.9% fewer special education students than the district rate. Those gaps are more than three times as wide as the gap in suburban/ rural areas, which come within 1.9% of meeting district rates of participation. It is important to re-iterate that Massachusetts charter schools are not expected to serve all special needs students in proportion to sending districts because charters are legally exempt from serving severe special needs students.



Low-Income Students

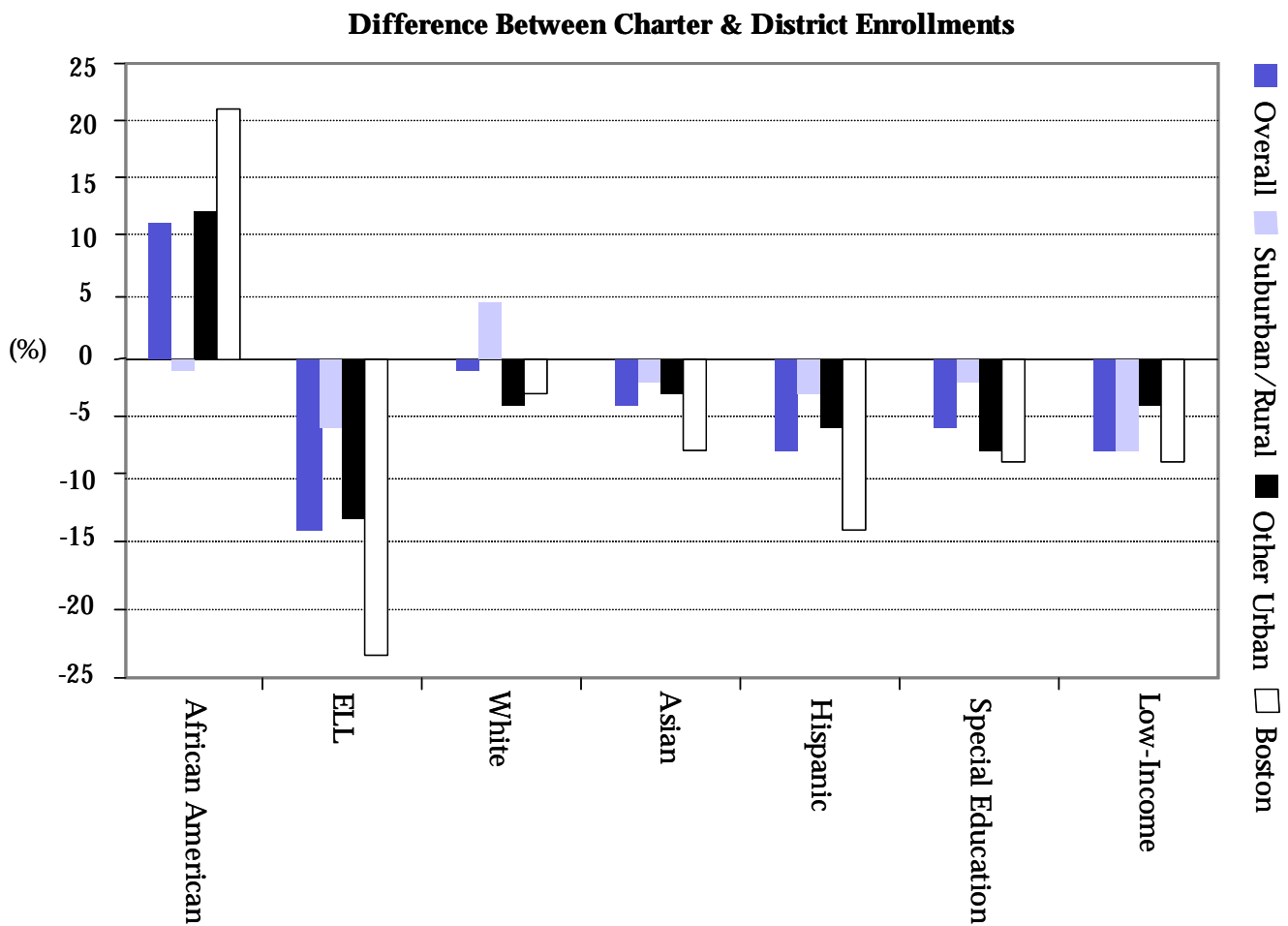
All charter schools serve fewer low-income students than their feeder districts, but by a margin of less than 10%. The difference between actual and expected low-income population in Boston, other urban areas, and suburban/ rural areas all come within five percentage points of one another. Boston charters serve 8.7% fewer low-income students than expected, compared to 4.5% in other urban areas and 7.2% in suburban/ rural areas. 'Low-income students' is the demographic with the least apparent variation across the three geographic categories. However, 'low-income students' is a category with a high mean variance.⁹ That is, individual schools vary considerably from the combined mean of all sending districts. For example,

Benjamin Banneker Charter School in Cambridge and Champion Charter in Brockton enroll almost 22% more low-income students than expected while other charters in the state enroll upwards of 30% fewer low-income students than they would be expected to serve given their feeder demographics.

⁹ The mean variance across all geographic areas is 7.8.

Summary of Key Points

- Charters, overall, serve a greater proportion of African American students than their feeder districts, but fewer English language learners, Asian, special education and low-income students.
- Boston charter schools are the most extreme in these departures from feeder district demographics; other urban charters follow a similar pattern to a lesser degree.
- Suburban and rural area charters are closest to their sending districts in demographic profile, but they vary from their urban counterparts in that they over-serve white students and under-serve African American students in proportion to feeder districts.



Analysis of Factors Affecting Charter Enrollment

It is useful to compare the demographics of charter schools to those of their feeder districts because such comparisons are implicit in ongoing debates about charters and choice. The assumption of similarity between charter school populations and those of their feeder districts is embodied in current policies, which suggest that charters could be a choice option for students across the state. However, this report is not intended to suggest that charter populations *should* mirror those of their feeder districts. Our data raise questions about what should be expected for *individual* charters. While charters, overall, might be expected to provide alternatives for all types of students, should some individual charters be permitted or even encouraged to focus on serving particular populations? This section of the report explores potential reasons why charters and sending districts have divergent demographic profiles and questions whether such variation is desirable in the system.

In our communications with charter leaders, representatives from the public schools and others, several individuals encouraged us to include two points to frame this analysis section. First, while charter schools as a whole tend to serve proportionally fewer Hispanic, low-income and special education and ELL students than their sending districts, certain individual charters exceed feeder districts in their enrollment of these same populations. Second, while it is worthwhile to compare charter schools to the feeder district populations, even traditional public schools in urban areas most often do not match the diversity of the entire district. This point is expanded in the next section.

Location

The vast majority of students that attend charter schools come from the neighborhood in which the charter is located. This is especially true in urban areas.¹⁰ As one charter leader described it, charters are often conceived of as neighborhood schools in parents' minds. Thus, in a large city like Boston, composed of a variety of demographic enclaves, charters would be expected to mirror the ethnic composition of the neighborhood, rather than the whole city. The charter leaders with whom we spoke report this to be the case.¹¹

There is no system to ensure geographic representativeness of charter schools and the resulting distribution is uneven across the state.¹² Charters arise in locations that founders propose and where space is available. The founders of many urban charter schools chose to locate in particular, economically-challenged areas of a city to provide a service to that area. Charter leaders cite a tension between focused service to a neighborhood that they perceive as being historically neglected, and the broader mission of open enrollment. They note that enrolling a greater proportion of neighborhood students make the logistics of creating a school community that includes intensive parent involvement more possible. However, they maintain that they are committed to serving students from other areas of the city and region.

¹⁰ Lacireno-Paquet, N. (2004). Do EMO-operated charter schools serve disadvantaged students? The influence of state policies. *Education Policy Analysis Archives*, 12, 26, 1-28.

¹¹ We did not have the data available to conduct a neighborhood-level analysis.

¹² Rennie Center for Education Research and Policy at MassINC (2003). Mapping school choice in Massachusetts: Data and findings 2003. Boston: Author.

Incentives

While the location of the school is one determinant of the school's demography, the funding policy that governed charter reimbursements until Fall 2004 may have created unintended financial benefits for charters that enroll more traditional learners.¹³ Under Chapter 70, *district* per pupil funding is calculated to account for the greater expense of educating certain demographic categories of students; however, *charter schools* received the district average per-pupil cost for each enrolled student.¹⁴ That is, a district that generally served a high-ELL and low-income population would receive more state funding per pupil than a district that served a low-ELL and high-income population. Yet, until now, a charter school that enrolled a student from a generally high-ELL, low-income district would obtain the same amount of funding whether that student was the rare affluent, native English-speaking student or a non-native English speaking, poorer student. When the charter enrolled the affluent English-speaking student they earned an amount of income disproportionate to the cost of educating that single student, and the district lost at the same disproportionate rate. Conversely, when the charter enrolled the low-income, non-native English speaking student, it received less than the district would for that same student.

The numbers in this report reflect this past reality. In modifying the formula, the new legislation seeks to ensure that districts pay and charters receive the amount that would be spent if the student were educated in the sending district. In doing so, the change seeks to align financial incentives with the service of students who are more expensive to educate.

Access to Potential Students

Finally, all students do not have equal access to charter schools. One significant access barrier is information.¹⁵ Parents and students need to know about the availability of charter schools in order to take appropriate steps to enroll in them. Charter leaders in Boston noted that they are not invited to participate in the district's information fairs, during which parents and students learn about the different school options that are available to them. Charter leaders also noted that they are unable to tailor recruitment in languages other than English, because they do not have access to district lists of the native language spoken in each student's home. Without these opportunities to provide information, charters are more likely to attract students from the families who are most motivated to seek out and exercise choice options.

Second, charters are not mandated to serve exactly the same breadth of students as regular public schools. Specifically, they are not required to provide access students with severe special needs. This legal exemption accounts for much of the disparity between actual and expected special education student enrollments in charter schools. Other charters are founded with a specific orientation toward the arts, math and

¹³ While our research found no evidence that charters abused this policy, this issue was raised by several of our informants as a possible explanation for the variance between charter and district demographics.

¹⁴ Charters also previously received the same amount of funding for elementary and secondary students, although districts received more for secondary students and less for high school students.

¹⁵ Howell, W.G. (2004). *Parents, choice, and some foundations for education reform in Massachusetts*. Boston: Pioneer Institute.

science, or even an explicitly “college prep” curriculum. Having such an orientation stated in the name of the school may encourage some groups of applicants while discouraging others from considering the school as a possibility for them. These types of charter schools acknowledged a tension between being accountable to their mission and being fully open in enrollment practices.

Conclusions and Policy Implications

This research demonstrates that charter schools serve somewhat different populations than the districts from which they draw students. Further, it clarifies that urban charter schools, especially Boston charters, differ in demographic composition from their suburban and rural counterparts. Charters in suburban and rural areas mirror their feeder districts’ demographics more closely than those in urban areas. As we have elaborated here, some level of imbalance between charter and district populations is normal. However, this research does suggest the need for further action by state policy makers, charter leaders and districts.

Implications for policy makers

- Policy makers should **clarify expectations regarding whom charter schools are expected to serve**. Debates over the future of charters and whether they are meeting public performance expectations will continue to be subject to misuse of data until they do. Some questions that remain unclear include: Are Massachusetts charter schools expected to serve all populations of students? Are they expected to over-serve certain minorities? Does the expectation vary by charter? Should some charters maintain a specific commitment to their neighborhoods? Should some be more selective, like the public exam high schools in Boston? The answers to each of these questions have implications for how we understand this and future research on demographics, as well as achievement. The answers also have implications for what capacities charters are expected to develop for serving populations with intensive needs such as special education students and English language learners.
- Chartering authorities should give **higher priority to new charters that will enroll under-served populations and operate in under-served geographic regions**, perhaps pursuing legislation to lift the cap on charters where significant gaps exist.
- Policy makers should **require charters to add a recruitment and retention plan** for minorities, special education students and English language learners to the annual reports they submit to the state.
- **Districts should be required to include all local charters in outreach**, including allowing participation in information fairs and providing data on parents’ native language to charters.
- The state has recently eliminated financial burdens for charter schools that enroll larger numbers of non-white students and non-traditional learners. Using this report as an initial benchmark for population data, policy makers

should **invest in longitudinal research** to determine whether and to what degree the changes in this structural scheme elicit changes in the demography of charter schools.

Implications for charter leaders

- The fundamental charge to charters that emerges from the research is that **more outreach to Hispanic, Asian, special education, and low-income students as well as English language learners is necessary**. The families of students in these demographic categories have not historically been the most aggressive in pursuing choice options and need more specific encouragement and information.
- In areas with multiple charters such as Boston, charter schools might **work together to expand services to special needs students and linguistic minorities**. One charter leader suggested that a group of schools could form a cooperative in which one school offered extensive services to English language learners from Southeast Asia, another to English language learners from Spanish-speaking countries, and another to autistic students. That way, all students would have the opportunity to exercise school choice.

Implications for districts

- Charters are a legitimate part of the public system. **Districts must not put up roadblocks to charter enrollment.**

Implications for both charter and district leaders

- Both charter school and district leaders can **explore opportunities for information-sharing** that create a bridge between charters schools and traditional public schools. For example, the Project for School Innovation is a network that connects teachers and leaders from charter schools and regular public schools throughout Massachusetts. It is an avenue for sharing best practices in areas such as curriculum and assessment.

Massachusetts has been a leader in the charter movement from its outset more than a decade ago. In order to continue to make informed decisions about financing and expanding charters— and to ensure that schools in traditional districts are not shortchanged in the process— state, district and school leaders must be attentive to the student populations being served by charters and how they compare to the populations of sending districts. Analysis of demographic information is an important starting point in debates about whether charter schools are achieving the goals for which they were established. It focuses us on the assumptions upon which charter policies are based and reveals where clarifications may be needed.

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The views expressed in this report do not necessarily reflect the views of the authors, their advisors, the Rennie Center for Education Research & Policy, or MassINC staff and board members.

Acknowledgements

We acknowledge with thanks the many people who provided support and information for the preparation of this document. Dianne Le, a recent graduate of the Harvard Graduate School of Education, conducted the initial data gathering and analysis for this project and was a valuable resource throughout the project. We also wish to thank the charter and district leaders who responded to our inquiries with thoughtfulness and candor. Finally, Department of Education staff in the divisions of charter schools and special education, as well as other school finance policy experts in the state also helped to inform our thinking.



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